CallPilot Fax User Guide

BCM 4.0
CallPilot

Document Status:**Standard**
Document Version: **02**
Part Code: **N0027227**
Date: **June 2006**

NORTEL

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Chapter 1
CallPilot Fax User Guide

About this guide

The *CallPilot Fax User Guide* explains how to use CallPilot Fax with your personal mailbox. It explains how to receive, print, and send fax messages.

To use this guide, you must determine which phone interface you use, and follow the procedures for that interface. For information about determining which interface you use, refer to "Checking which mailbox interface you use" on page 11.

Note: If you need information about other CallPilot features, refer to the *CallPilot Reference Guide* or ask your system administrator.

Audience

This guide is for CallPilot Fax users.

Symbols and text conventions

These symbols are used to Highlight critical information for the BCM system:

Caution: Alerts you to conditions where you can damage the equipment.

Danger: Alerts you to conditions where you can get an electrical shock.

Warning: Alerts you to conditions where you can cause the system to fail or work improperly.

Note: A Note alerts you to important information.

Tip: Alerts you to additional information that can help you perform a task.

Security note: Indicates a point of system security where a default should be changed, or where the administrator needs to make a decision about the level of security required for the system.

Warning: Alerts you to ground yourself with an antistatic grounding strap before performing the maintenance procedure.

Warning: Alerts you to remove the BCM main unit and expansion unit power cords from the ac outlet before performing any maintenance procedure.

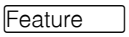
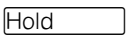
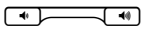
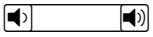
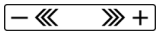
Telephone buttons

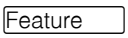
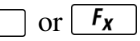
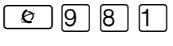
All one line and two line display telephones provide CallPilot voice prompts. On telephones with display buttons, the voice prompts are delayed for five seconds. If you do not see an option on your telephone display, wait for the voice prompt to announce the additional options.

To use Fax features, press the display buttons or the dialpad buttons on your telephone.

When you see a display button like this: PLAY, or a dialpad button like this: 2, press either button to activate the CallPilot feature. This guide shows you both methods.

This table shows the Business Series Terminal buttons. Use the buttons that pertain to the type of telephone you use.

Button name	T7100, T7208, T7316	M7100, M7208, M7310, M7324	M7100N, M7208N, M7310N, M7324N
Feature			
Handsfree	Bottom right-hand button		
Hold			
Volume Control			
Release			

You can enter ,  or  and the code to use a feature.
For example, press  to access your mailbox.

The T7100 works differently from other telephones on your system because it does not have line buttons. Where other telephones require that you select a line button to answer a call, on the T7100 terminal you pick up the handset. Where other telephones require you to select a line button to take a call off hold, you press on the T7100 terminal.

On T7100 terminals, you can answer a second call by pressing . Your active call is put on hold and you connect to the waiting call. You can have no more than two active calls at one time.

These conventions and symbols are used to represent the Business Series Terminal display and dialpad.

Convention	Example	Used for
Word in a special font (shown in the top line of the display)	Pswd:	Command line prompts on display telephones.
Underlined word in capital letters (shown in the bottom line of a two line display telephone)	PLAY	Display option. Available on two line display telephones. Press the button directly below the option on the display to proceed.
Dialpad buttons	#	Buttons you press on the dialpad to select a particular option.

Related Publications

This section provides a list of additional documents referred to in this guide.

CallPilot Reference Guide (N0060617)

Learning about Fax

With CallPilot Fax you can access Fax features from your personal mailbox.

A fax document in a mailbox is called a fax message. Fax messages can have a voice introduction. This means that a caller can leave a fax message with or without an introductory voice message in your personal mailbox.

You can:

- retrieve and print the fax message on a fax machine
- forward the fax message to another mailbox

About the Express Messaging Line

You can have an Express Messaging Line assigned to your mailbox. An Express Messaging Line allows you to send only a fax message when the fax only option is selected or to send voice and fax messages when the fax only option is not selected. A fax message sent to the Express Messaging Line bypasses the Automated Attendant and is sent immediately to your mailbox. You access the fax message the same way you access other fax messages. For more information about accessing fax messages, refer to "Receiving a fax message" on page 13.

Ask your System Administrator for the telephone number of your Express Messaging Line. Then you can inform people of your direct fax line number.

Checking which mailbox interface you use

CallPilot supports two interfaces: Norstar Voice Mail and CallPilot. The System Administrator determines which interface is assigned to your mailbox.

Use this procedure to check which mailbox interface you use, then follow the procedures in the guide that apply to the interface you use.

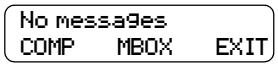
Some procedures apply to both interfaces.

To check which mailbox interface you use

1 Press [ ] 9 8 1.
Follow the voice prompts or the display button options to open your mailbox.

2 Check the display to see which interface you use:

This is the Norstar Voice Mail interface.



This is the CallPilot interface.

3 Press [ ] to end the session.

Telling callers about fax in your mailbox greeting

In your mailbox greeting, tell callers that they can leave fax messages in your mailbox. Tell callers that they must call from a fax machine telephone to send you a fax message. The caller must press START/SEND on the fax machine. CallPilot automatically receives and stores the fax message in your mailbox. This is an example of a Personal mailbox greeting:

"*Hello. You have reached Brian Purdy with Ideal Office Machines. I am in the office today, but I am currently away from the phone. Please leave your name, telephone number and a brief message after the tone. If you want to send me a fax and you are calling from a fax machine telephone, press the START/SEND button on the fax machine now, or when this message ends.*"

For more information about mailbox greetings, refer to the *CallPilot Reference Guide* or ask your System Administrator.

Note: Recorded greetings count towards the storage capacity of a mailbox. Avoid recording long greetings if possible. If recorded greetings are long, there will be less storage time in the mailbox for messages.

To record a mailbox greeting

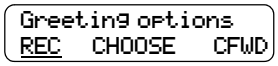
1 Press [ ] 9 8 1.
Follow the voice prompts or the display button options to open your mailbox.

2 If you use the CallPilot interface:

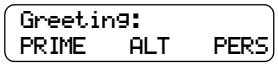
- Press 8 2 to open the Greetings Options menu
- Go to step 3

If you use the Norstar Voice Mail interface:

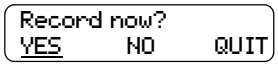
- Press ADMIN or 8
- Press GREET or 2
- Go to step 3



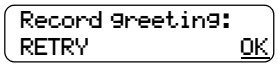
3 Press REC or 1.



4 Press PRIME or 1 to record the Primary greeting
or
press ALT or 2 to record the Alternate greeting.



5 Press YES or 1 and record your greeting at the tone.



6 Press OK or # to end the recording.

7 Press OK or # to accept the recording
or
press PLAY or 1 to listen to the greeting
or
press RETRY or 2 to re-record the greeting.

8 Press [ ] to end the session.

Receiving a fax message

Fax messages can contain a voice message that a caller records to introduce the fax message, or they can contain just the fax message.

A caller can send a fax message to your personal mailbox by using the autosend feature on their fax machine. If the call is answered by the Automated Attendant, the call transfers to the designated Fax answering extension. If the call is answered by a mailbox, the fax message is placed in the mailbox. If you answer the call, you hear a fax tone. Transfer the fax call to your mailbox.

Transferring a fax call to your mailbox

If you answer a call and hear a fax tone, a caller is attempting to send a fax message to your mailbox. You can transfer the call to your mailbox.

To transfer a fax call to your mailbox

1. Press [transfer] 9 8 6.
   Do not put the call on hold.
2. Enter your mailbox number.
   The fax message is left in your mailbox.

When you receive a message in your mailbox, your telephone display shows:

```
Message for you
MSG
```

This display indicates that you have a new voice message or a fax message in your mailbox. To check for messages, you must open your mailbox.

Opening your mailbox

To open your mailbox — Norstar Voice Mail

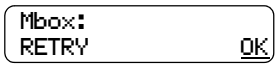
1 Press [Transfer] 9 8 1.

2 Enter your mailbox password and press OK or #
or
if you are at another extension, or if you are using a Guest mailbox, press OTHR or * to display the Log: prompt. When this prompt appears, enter your mailbox number and password. Your mailbox number is usually the same as your extension.

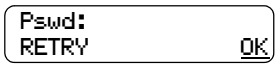
3 After you open your mailbox, the telephone display shows how many new and saved messages you have.
A voice prompt announces how many new and saved voice and fax messages you have.
In this example there is one new message and one saved message.

To open your mailbox — CallPilot

1 Press [Transfer] 9 8 1.



2 Press #
or
if you are at another extension, enter your mailbox number and then press OK or #.
Your mailbox number is usually the same as your extension.



3 Enter your mailbox password and press OK or #.
After you open your mailbox, the telephone display shows how many new messages you have.
A voice prompt announces how many new and saved fax messages you have.

Printing fax messages

You can print the fax messages in your mailbox on any fax machine. You can print all of your fax messages at once or individually.

An average text fax message uses 10 seconds of mailbox message time per page. A fax message that contains graphics can use as much as two minutes of mailbox message time per page. Because fax messages can take up a lot of mailbox space, after you print or forward your fax messages, delete them from your mailbox.

If you print all your fax messages at once, you cannot listen to any voice introductions that are included with the fax messages. If you do not listen to a voice introduction, the fax message remains “new” in your mailbox and you can listen to the voice introduction later.

If you print each fax message individually, you can listen to the introduction before you print the fax message.

About destinations for printing fax messages

When you print a fax message, you can print it from:

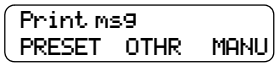


Table 1 Fax destinations

Preset	You can set up a fax machine as the default destination. When you print and you select Preset, the fax machine prints at the default destination. Unless you specify Other, faxes print at the default destination.
Other	When you send a fax message to print and you select Other, you must enter a phone or extension number as the destination.
Manual	Select Manual if you are printing from a fax telephone. The fax messages are printed on the fax machine you use to access your mailbox.

Fax messages are preceded by a cover page if you select Preset or Other. A cover page is not added for fax messages you print from a fax telephone. For more information refer to “Fax cover page” on page 21.

Assigning a preset fax machine

If you assign a preset fax machine, your fax messages print at the same fax machine every time.

To assign a preset fax machine

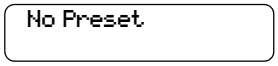
1 Press [✆] [9] [8] [1].
Follow the voice prompts or the display button options on your telephone to open your mailbox.

2 If you use the CallPilot interface:

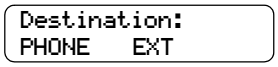
- Press [8] [0] to open the Mailbox Options menu
- Press [3] to open the Fax Options menu
- Go to step 3

If you use the Norstar Voice Mail interface:

- Press ADMIN or [8]
- Press [7]
- Go to step 3



3 This display appears if there is no preset fax machine.
If the fax machine is preset, the display shows: Preset fax.
If you want to assign a different machine as the preset fax machine, press CHNG.



4 Press PHONE or [1] to assign the phone number of a fax machine
or
press EXT or [2] to assign the extension number of a fax machine.
This example shows assigning the phone number of a fax machine.

5 Enter the fax telephone number and press OK or [#].

6 Press OK or [#] to accept the fax telephone number represented by the <x>
or
press ADD to add special characters to the fax telephone number and follow the prompts.
After you add special characters press OK or [#].

7 Press [☎] to end the session.

To print all your fax messages

Use this procedure if you want to print all your new or saved messages.

If you want to print just one message, refer to"To print an individual fax message" on page 19.

To print all fax messages

1 Press [Menu] [9] [8] [1].
Follow the voice prompts or the display button options on your telephone to open your mailbox.

2 If you use the CallPilot interface:

- Press [7] [7] to open the Print Command menu
- Go to step 3

If you use the Norstar Voice Mail interface:

- Press [1]
- Go to step 3

3 If you use the CallPilot interface:

- Press MSG or [1] to print an individual message
  or
- press NEW or [2] to print all unprinted fax messages
  or
- press ALL or [3] to print all faxes with their attachments

If you use the Norstar Voice Mail interface and you have new fax messages:

- Press NEW or [1] to print all your new fax messages
  or
- press SAVED or [2] to print all your saved fax messages

If you do not have any new fax messages the display in step 4 appears.

```
Print msg
PRESET  OTHR   MANU
```

4 Press PRESET or [1] if you want to print on the preset fax machine and go to step 8
or
press OTHR or [2] if you want to print on a fax machine other than the preset fax machine and go to step 5.

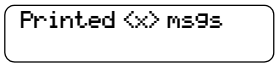
```
Destination:
PHONE    EXT
```

5 Press PHONE or [1] to print fax messages at a fax telephone number
or
press EXT or [2] to print fax messages at a fax extension number.
This example shows entering the phone number of a fax machine.

```
Ph:
RETRY            OK
```

6 Enter the fax telephone number and press OK or [#].

7 Press OK or # to accept the fax telephone number represented by <x>
or
press ADD to add special characters to the fax telephone number and follow the voice prompts.



8 The display shows the number of fax messages printed.

9 Press ☎ to end this session.

After you end the session, CallPilot prints the fax messages on the preset fax machine.
For information about changing the preset fax machine, refer to "Assigning a preset fax machine" on page 16.

To print an individual fax message

Use this procedure if you want to print an individual fax message.

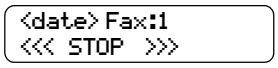
1 Press ✆ 9 8 1.
Follow the voice prompts or the display button options on your telephone to open your mailbox.

2 If you use the CallPilot interface:

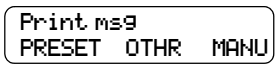
- Press 7 7 to open the Print Command menu
- Go to step 3

If you use the Norstar Voice Mail interface:

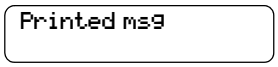
- Press 6 until you locate the fax you want to print
- Go to step 3



3 Wait until the prompt announces the Fax ID number, and then press 1 to print the fax message.



4 Press PRESET or 1 to print on the preset fax machine
or
press OTHR or 2 if you want to specify another fax machine to print the message on, and then enter the number of the fax machine.



5 The display shows the message is printed.

6 Press ☎ to end this session.

After you end the session, CallPilot prints the fax message on the fax machine you specified.

To print fax messages from a fax telephone

1. From a fax machine telephone, call into a line that is answered by the Automated Attendant.
2. Press * *, or in the UK press 8 8, to access your mailbox while the Automated Attendant Greeting plays.
3. Log on to your mailbox:
   - If you use the Norstar Voice Mail interface, enter your mailbox number and password and press #
   - If you use the CallPilot interface, enter your mailbox number and press #, then enter your password and press #
4. Send the fax message to print:
   - If you use the Norstar Voice Mail interface, press 1 to print your fax messages
   - If you use the CallPilot interface, press 7 7 to print your fax messages
5. If you have new and saved fax messages, you can print either all new or saved fax messages:
   - press 1 to print all new fax messages
   - press 2 to print all saved fax messages

   Step 5 is bypassed if you have only new fax messages or only saved fax messages.
6. Press 3 to use the Manual option to print the new fax messages.
7. Press START/SEND on the fax machine.
8. Replace the fax machine telephone handset.
   The session ends when all the faxes are printed.

CallPilot prints the fax messages on the assigned fax machine.

Fax cover page

A fax cover page prints with each fax message you print using the Preset and Other feature. The fax cover page shows:

- the date and time the fax prints
- the name and telephone number of the mailbox owner
- the destination fax number
- the Fax ID number (if you print a single fax message)
- the number of pages to follow

Note: A fax cover sheet is not added if you print a fax from a fax telephone.

Sending fax messages

To send a fax message to a personal mailbox you must call from a fax machine telephone. You can include a voice introduction to a fax message you send to a personal mailbox. The voice introduction must be at least three seconds long. The system times out after five seconds of silence.

To send a fax message to a personal mailbox

1. Place the document that you want to send in the fax machine.
2. From the fax machine telephone dial the CallPilot telephone number of the person you want to send a fax to.
3. Wait for the mailbox greeting or let the CallPilot operator transfer you to the mailbox to leave a fax message. If the person you are calling answers their telephone, tell them to transfer you to their mailbox so you can send a fax.
4. After the mailbox greeting plays, wait for a beep and record an introduction for the fax message. Do not hang up the telephone.
5. Press START/SEND on the fax machine.
6. Replace the fax machine telephone handset. The session ends when the transmission is complete.

Forwarding fax messages

You can forward a fax message that you have received to another mailbox and add a voice introduction. If you record a voice message it must be longer than three seconds. The system times out after five seconds of silence.

The message appears as a fax message in the recipient's mailbox. If you cannot forward a fax message, ask your System Administrator if your mailbox is set up to allow you to forward fax messages.

You can send the same fax message to more than one person, but not to a Group List.

For information on forwarding a fax message to an external number, refer to "To forward a fax message to a mailbox — Norstar Voice Mail" on page 23.

When you forward a fax message, a new cover page is added to the original fax message, becoming part of the new message. If the fax message already has a CallPilot-generated fax forward cover page, it is replaced by a new fax forward cover page.

Fax forward cover page

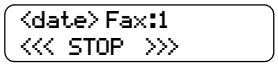
A fax forward cover page contains the same information as a fax cover page plus:

- the recipient's name
- the Fax ID number if the fax is forwarded to an external number

To forward a fax message to a mailbox — Norstar Voice Mail

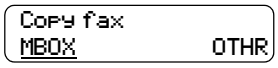
1 Press [ ] 9 8 1.
Follow the voice prompts or the display button options on your telephone to open your mailbox.

2 Press PLAY or 2 if you have a new fax message
or
press 6 to review your messages until you find a saved fax message you want to forward.

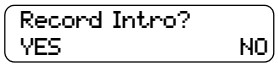


3 The date received and the Fax ID number appear on the display.

4 Press COPY or 5.

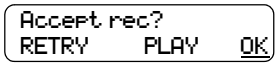


5 Press MBOX or 1 to forward the fax message to another mailbox.

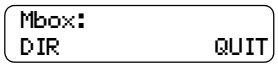


6 Press YES or 1 to record an introduction to the fax message
or
press NO or 2 and go to step 10 if you do not want to record an introduction to the forwarded fax message.

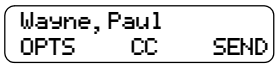
7 Record the introduction and press OK or # to end the recording
or
press RETRY or 1 to re-record the introduction
or
press PAUSE or 2 to pause while you record the introduction.



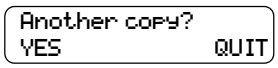
8 Press OK or # to accept the recording.



9 Enter the mailbox number you want to forward the fax message to
or
press DIR or # to search the Company Directory.



10 Press SEND or # to forward the message without a delivery option
or
press OPTS or 3 to assign message delivery options. For information about delivery options refer to the *CallPilot Reference Guide*.



11 To send this message to another mailbox owner, press YES or 1 and repeat steps 6 to 11
or
press QUIT to end the session.

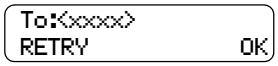
To forward a fax message to a mailbox — CallPilot

1 Press [ ] 9 8 1.
Follow the voice prompts or the display button options on your telephone to open your mailbox.

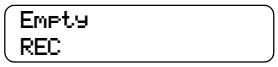
2 Press 2 to play the first message
or
press 6 until you find the fax message you want to forward.

3 Press 7 3 to forward the message.

4 Enter the mailbox number you want to forward the fax message to and press OK or #
or
press NAME or 1 1 to search the Company Directory.



5 Press OK or # to end the list of addresses.



6 If you want to attach a voice message, press REC or 5 and record your message.

7 If you want to attach message options, press 7 0 to assign message options.

8 Press 7 9 to send the message.

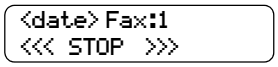
9 Press [ ] to end the session.

To forward a fax message to an external number — Norstar Voice Mail

You can forward a received fax message to an external number. However, you cannot add an introductory voice message to the fax message.

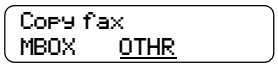
1 Press [ ] 9 8 1.
Follow the voice prompts or the display button options on your telephone to open your mailbox.

2 Press PLAY or 2 to play the first message
or
press 6 until you find the fax message you want to forward.

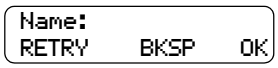


3 The date received and the Fax ID number appear on the display.

4 Press COPY or 5.



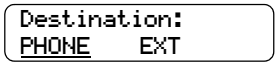
5 Press OTHR or 2.



6 Enter the recipient's name. The name can be a maximum of eight characters. Using the telephone dialpad, enter the name of the recipient. After each letter, press # to enter the next letter.

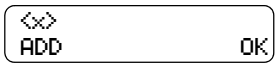
If you make an error in the name, press RETRY and re-enter the name.

Press OK to accept the name.

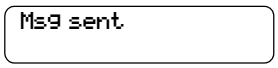


7 Press PHONE or 1 to enter the fax telephone number.

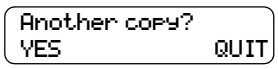
8 Enter the fax telephone number and press OK or #.



9 Press OK or # to accept the fax telephone number represented here by <x>
or
press ADD to add special characters to the fax telephone number. For information on adding special characters, refer to "Adding special characters to a fax telephone number" on page 30.



10 CallPilot forwards the fax message.



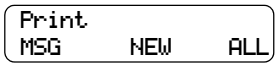
11 Press YES or 1 and repeat steps 6 to 11 to send this message to another external number
or
press QUIT if you are done.

12 Press ☎ to end the session.

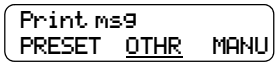
To forward a fax message to an external number — CallPilot

1 Press [ ] 9 8 1.
Follow the voice prompts or the display button options on your telephone to open your mailbox.

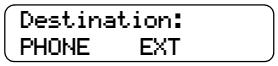
2 Press 7 7 to open the Print Command menu.



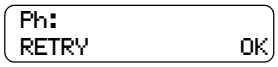
3 Press MSG or 1 to forward the current message
or
press NEW or 2 to forward all your new fax messages
or
press ALL or 3 to forward all your new and saved fax messages.



4 Press OTHR or 2 to specify the fax machine you are forwarding the fax message to.

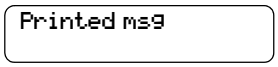


5 Press PHONE or 1.



6 Enter the phone number of the fax machine you are forwarding the fax message to.

7 Press OK or # to accept the phone number
or
press ADD or 2 to add special characters.



8 The display shows the message is printed.

9 Press [ ] to end the session.

About Fax Group messages

Send a Fax Group message if you want to send a group a fax message that pertains to them. Fax Group Lists are created by the System Administrator.

Fax Group Lists

If you frequently fax information to the same group of people, use a Fax Group List.
A Fax Group List is a collection of fax machines at other locations. When you send a fax message to a Fax Group List, you enter only the address of the list, but each fax machine in the Fax Group List receives the fax message. Ask your System Administrator for a list of fax machines in each Fax Group List.

If you need a Fax Group List, ask your System Administrator to create one for you. When you give the System Administrator the information, include:

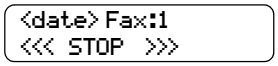
- the names of the recipients
- a list of the fax machine numbers
- the Fax Group List name

Before you send a Fax Group message, be sure your System Administrator has created the Fax Group List, and the list contains all the fax machines that are to receive the fax message.

To send a Fax Group message — Norstar Voice Mail

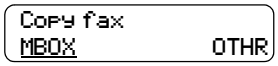
1 Press [ ] 9 8 1.
Follow the voice prompts or the display button options on your telephone to open your mailbox.

2 Press PLAY or 2 to play the current message
or
press 6 until you find the fax message you want to forward.

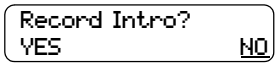


3 The date received and the Fax ID number appear on the display.

4 Press COPY or 5.



5 Press MBOX or 1 to forward the fax message to another mailbox.



6 Press NO or 2.
Do not record an introduction because Fax Group List recipients do not hear voice introductions.

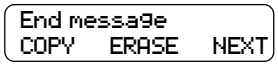
7 Enter the Fax Group List number.

8 Press SEND or # to send the fax message
or
press OPTS or 3 to assign message delivery options
or
press CC to send the message to another recipient.
For information about delivery options refer to the *CallPilot Reference Guide*.

9 Press [ ] to end the session.

To send a Fax Group Message — CallPilot

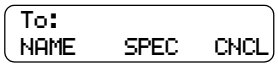
1 Press [ ] 9 8 1.
Follow the voice prompts or the display button options on your telephone to open your mailbox.



2 Press PLAY or 2 to play the current message
or
press 6 until you find the fax message you want to forward.

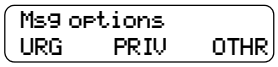
3 Press 7 3 to forward the message.

4 Enter the Group List number and press OK or #.

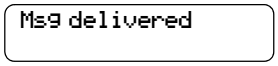


5 Press 7 3 when you have entered all the addresses you want to send the message to.

6 If you want to attach a voice message, press REC or 5 and record your message.
External Group List recipients do not receive voice introductions to fax messages.



7 If you want to attach message options, press 7 0 to assign message options.



8 Press 7 9 to send the message.

9 Press ☎ to end the session.

Adding special characters to a fax telephone number

Follow the voice prompts or press ADD to add special characters to a fax telephone number.

Note: If you are adding special characters, do not press the dialpad buttons # to enter #, or * to enter *. Press the button directly below the option on a two line display telephone, or listen to the voice prompts.

Press	To
2 or DIGS	resume adding digits to the destination phone number.
3 or PAUS	enter a timed pause that appears as P on the display. Pauses are four seconds long.
4	recognize dial tone (behind PBX). The Recognize Dial Tone special character appears as D on the display.
5 or OTHR #	enter #.
6 or OTHR *	enter *.
TONE	recognize dial tone (behind PBX). The Recognize Dial Tone special character appears as D on the display.
*	cancel and retry.